

Mastering Omnichannel CX

A Success Guide

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Introduction

Companies with strong omnichannel strategies retain 56% more customers and convert at least 10% higher than those without them. Omnichannel is a dominant theme in customer experience (CX) right now and with business impact like that, it will be here to stay.

Your customers don't think about "channels" when reaching out to you; they simply look for the most convenient way to connect in that moment. They expect personalized engagement every time – but this is nearly impossible without a full understanding of who they are and what previous interactions they have had with you. Customers want to switch between live chat and email without having to repeat themselves; according to a survey conducted by UBM, 75 percent of participants cited having to repeat themselves as their biggest issue when communicating with a brand. Customers also want consistency - to be attended to with the same level of quality service, no matter how they engage with you or what they are looking to accomplish. Most brands are struggling to deliver

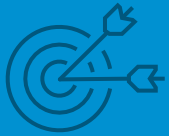
As more digital channels like email, live chat, social messaging, and SMS texting get added to CX offerings, it gets harder to manage them all in one place and maintain a complete view of the customer. This inhibits effective personalization and results in inconsistencies and frustration. Some brands are failing to offer popular digital channels entirely, overcome by the fear of change; others think they're giving the customers what they want but are falling short. For example, 60 percent of companies think they're providing a good mobile experience, but only 22 percent of consumers agree.

The end result? A widening disconnect between what customers want and expect and what companies are delivering, and a severe hit to customer experience. This is directly stunting companies' growth and their competitive edge. According to IDC, 85 percent of enterprise decision-makers say they have a time frame of two years to make significant inroads into digital transformation or they will fall behind their competitors and suffer financially. This was published in May 2019, which means time is running out.

The solution to this pressing challenge? Digital omnichannel. Digital omnichannel switches the focus from the channels to the customer by centralizing communication and preserving history. This allows for seamless interactions with customers across channels while also making internal processes more effective. Companies with extremely strong omnichannel customer engagement retain on average 89 percent of their customers, compared to 33 percent for companies with weak omnichannel customer engagement.

Still, like any digital transformation initiative, you need to know if omnichannel is the right solution for remedying your organization's pain-points and reaching your goals. This eBook will examine whether digital omnichannel is right for your business, and if so, how to make it successful so you can become one of the organizations that are winning with omnichannel.

A great omnichannel strategy



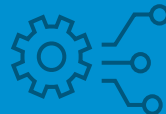
Aligns with your company goals



Has clear rules of engagement and SLAs



Unifies your existing channels



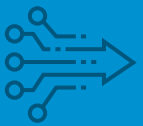
Uses automated routing rules for efficient service



Creates an effortless digital journey



Extends red carpet treatment to your VIPs



Integrates with and improves your current tech stack



Provides actionable best practices for agents



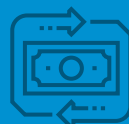
Gets buy-in from your organization



Empowers agents with powerful tools



Flourishes under your team's existing structure



Provides measurable ROI

What is digital omnichannel CX?

What is digital omnichannel?

Digital omnichannel breaks down the silos between digital communication touchpoints to form a unified view of the customer. This gives companies crystal-clear insight into their customers' individual journeys and enables effective and cohesive engagement across all digital channels.

With digital omnichannel, agents can view every interaction that the customer has had with the company within one single console - whether through email, live chat, social media, or texting. This visibility allows businesses to create deeply personalized and consistent messages across all channels for a higher quality of service and an efficient, helpful experience. Organizations can also strategically automate and customize proactive outreach for better sales and service opportunities.

Not only does digital omnichannel enable complete centralization of customer communication, it also allows companies to create service level agreements (SLAs) and routing that are unique to each channel. Messages from different channels or from different customer profiles can be immediately prioritized to the agent based on time, importance, or other factors. Done right, it isn't just your customers who benefit from digital omnichannel—your agents can do their jobs more effectively and your company can grow more easily thanks to better data collection processes and access.

What digital omnichannel CX is not

From the customer's point of view, their communication with your organization isn't segmented - they know what they've said to you on each channel. But as organizations offer more communication channels and there are more touchpoints in a customer's journey, it can be very difficult to track and manage every communication in one place.

Digital omnichannel is not about making sure you're on the latest channel like WhatsApp or Apple Business Chat. Instead, omnichannel represents a [big-picture shift](#) in how companies work and what customers want in today's digital-first world. At its core, digital omnichannel is about how seamless experiences, not channels, are changing the entire service, support, marketing, and sales landscape, from the front desk to the backend.

A digital omnichannel solution is not a CRM or a phone system (more about how it works with these systems on [page 17](#)). It is not focused on one digital channel. Instead, digital omnichannel offers one holistic customer view through data, reporting, and insights across digital channels. The result: improved customer service and greater agent efficiency tied together by a unified experience no matter the channel.

Examples of digital omnichannel in action

Without the context that digital omnichannel provides, it is hard for companies and agents to serve customers consistently. As a result, customer interactions can look like this:

Diana reaches out to a company via email about making a change to an existing order. When she doesn't receive an immediate response, she writes a Facebook post on the company's page in hopes of pushing the matter along more quickly. By the end of the day, agents have reached back out to Diana on both platforms, each giving her potentially different responses about what can be done to help her. Diana, who had been hovering over a product page thinking about making a second purchase, closes the window in frustration because the unresolved issue and conflicting responses left her concerned about buying from the company again.

For customers, such an experience is incredibly aggravating. This is as much true for present interactions as it is for past interactions, such as when an agent doesn't have the history of a conversation that happened a few weeks ago because it was on a different channel. With digital omnichannel, agents can merge concurrent cases into one "ticket" so that the full story is preserved and the customer gets the answer they seek.

Here's how this interaction might have looked with digital omnichannel:

Diana reaches out to a company via email about making a change to an existing order. When she doesn't receive an immediate response, she writes a Facebook post on the company's page in hopes of pushing the matter along more quickly. The agent who is assigned Dianna's query can see her entire cross-channel

communication history. With this instantaneous singular view, the agent follows up with Diana through email – her primary channel – and acknowledges that she reached out about the same issue on Facebook as well. She assists Diana with any necessary changes to her order and asks her if she needs any assistance regarding any other products, such as the one that she had been hovering on. She assists Diana through the purchasing process and Diana feels so satisfied with her service, she tells five friends.

When coupled with information such as web activity data and transaction history, digital omnichannel can also be used as a powerful sales tool. This data can be readily available when your customer engagement platform is integrated with your CRM, marketing automation, accounting, or shipping system. With the context they need to help customers at any stage in their digital journey, companies can make smarter, proactive connections and close more business.

Pro Tip

To learn more about how to set standards for different channels, read our white paper [‘Customer Engagement 2020: Why the Digital Journey Changes Everything and How to Keep Up.’](#)

Is digital omnichannel right for your organization?

In this section we'll help you determine if omnichannel makes sense for you and your customers.

Define your goals

Just because omnichannel is an emerging trend in CX doesn't necessarily mean it's right for your company. Whether your organization should adopt digital omnichannel depends on how it aligns with your corporate goals. This includes how it fits within your vision for your business, profitability objectives, customer service objectives, employee retention, operational efficiency, and growth.

Consider your overall business goals and how they relate to your specific sales and customer service objectives. For example, your sales goal is likely a dollar value, but to get there you might be aiming to reduce shopping cart abandonment, increase the number of demo requests, or grow your average invoice value.

Make a list of 'leading indicators' or proof points of a successful program, then note what your current metrics for each of them are. These will act as your baseline. After implementing a new CX program, measure them again and see if there's been any improvement.

Here are some examples of sales and marketing goals that might be part of your broader business goals:

Revenue or Assets Under Management (AUM): What revenue or assets under management have you sourced from digital interactions? This is often the ultimate test of whether a program is showing ROI. If you break this value out by channel, does one channel seem to produce more pipeline than another? A digital omnichannel platform will reveal more than just the original source of that customer who contributed to revenue or AUM.

Share of Wallet: How much money is each customer spending with you compared to everything else they spend on? Would this customer buy more products or services, be interested in a different product or service, or have some other untapped value?

Digital omnichannel can help you get a full picture of your customer to know if they are interested in something else you offer and if you can make more money from them.

Pipeline: How many new opportunities have you created through digital engagements and what are the value of those opportunities? Again, look at the customer engagements across all channels, not just the channel that the customer initially came in on or finally made the purchase through.

Conversational Conversions: Can your business make sales, open accounts, or offer an upsell opportunity to your customers via secure online correspondence? If so, what's your conversation or chat conversion rate? Are your channels easy enough to use to inspire consistent conversion? Remember, one study found that e-commerce customers who were given digital omnichannel experiences [spent 10% more](#) on average than in-store.

Marketing Qualified Leads (MQLs): How many MQLs do you generate? How many of those have converted to Sales Accepted or Qualified Leads or Opportunities (SAL, SQL, SQO)? A digital omnichannel platform can help elaborate on your multi-touch attribution reporting and influence your buyer's journey mapping.

Lead generation: How many leads do you earn before and after you go digital? How many demo requests, contact requests, or shopping cart 'holds' do you get from each?

For customer service goals, you may be measuring the following:

Customer Satisfaction (CSAT): Consider your current standing with customer satisfaction. What is your average rating, and where do you want it to be?

Customer Churn Rate: What percentage of your customers in a given time period leave to go to a competitor or simply never buy from you again? Remember, one study showed that companies with strong digital omnichannel strategies retain 56% more customers than those without them.

Customer Effort Score (CES): How are your customers self-rating the amount of effort they have to go through to accomplish their goals and/or get a satisfactory response?

First Contact Resolution (FCR): Do customers get their problem solved the first time or do they have to get in touch again? And again?

Average Handle Time (AHT): How long do your agents spend on one issue before it is resolved? Are your current distinct AHT goals being met on each channel?

Chatbot success rate: What percentage of queries are your bots currently able to resolve without an agent stepping in?

Net Promoter Score (NPS): How willing are your customers to recommend your brand to friends or colleagues?

Agent Churn or Turnover Rate: How do the number of agents that leave your organization compare to the number that you hire?

Agent Morale: How do your agents rate their personal satisfaction? Does your team have good morale, or are they low-energy? Where do you want that morale to be?

Maintaining a central data repository through digital omnichannel will help you measure your performance on these metrics as a whole, rather than having to pull reporting for each channel individually.

Consider how your company is currently performing with the metrics listed above (and any other that might be pertinent to your organization). Which areas do you currently need to improve on? Consider what role, if any, digital omnichannel can play in helping you achieve the objectives and key results (OKRs) that your organization requires. Ask yourself where you want to be in three months, one year, and five years. Does this align with the vision and reality of digital omnichannel?

Pro Tip

Having S.M.A.R.T. goals that are Specific, Measurable, Attainable, Realistic, and Timebound will help you see the most success when incorporating digital omnichannel into your overall business strategy.

Evaluate your needs and choose a vendor

Evaluate your existing channels

After establishing and aligning your business goals with leaders across departments including Customer Service, Support, Sales, IT, Operations, and Marketing, you should discuss how to best approach these goals as a collective team. If you think switching to omnichannel is the best route forward for your team, get buy-in from other leaders first and consult with them to see if they have any specific needs as you evaluate channels and vendors.

To successfully employ digital omnichannel, you must first evaluate which channels you already have and consider which ones you want to incorporate into your digital strategy.

According to Marketing Week, 15 years ago the average consumer used two touchpoints when making a purchase and only 7 percent regularly used more than four. Today, [consumers use an average of almost six touch-points](#) with nearly 50 percent regularly using more than four.

You don't need to be available to your customers on every single channel in order to benefit from a digital omnichannel platform. Use data collected from previous interactions such as web traffic data, FCR by channel, and how many inquiries each channel gets to learn how your customers are reaching you and which channels they prefer. When considering new channels, consider whether your customers and prospects are active on that channel and whether they might like to be served there, or if it would seem intrusive from your brand. You should only add new channels if it makes sense for your audience. The key here is to do your research and make sure you are not just following a trend, but actually providing a useful service to your audience.

On the other hand, do not ignore a channel just because you have never tried it before. In a post-chat survey, [The Cumberland found that 62 percent of their customers said they wouldn't have reached out at all if live chat hadn't been available](#) – something they didn't know until they tried live chat!

If you're not sure which channels to use, don't worry. You could always test a channel, promote its availability to your customers, and see how much engagement you get. With digital omnichannel, it's easy to add and subtract channels from your existing strategy with virtually zero additional agent training.

Here are the top channels to consider adding to your digital omnichannel offering:

Live chat

Live chat uses a small window on your website or mobile app to connect customers directly to a live agent or chatbot from any desktop or mobile device. It is one of the most popular ways for customers to communicate with brands online. According to research by J.D. Power, [live chat is preferred by customers](#) over both email and social media. Live chat can increase website conversions by 20 percent or more on average, and customers who use live chat are three times more likely to make purchases than those who don't. The best live chat solutions include audio and video chat, co-browsing, easy file sharing, message or field encryption, and even automatic translation. This makes the live chat service experience even more personalized for the customer and more productive for the agent, while application-level security makes it one of the most secure forms of digital communication.

Social media

Whether it's on Facebook, Twitter, or LinkedIn, social media brings brands into customers' personal spheres and lets customers engage with companies publicly or privately. One-to-many, public customer interactions on this channel are important for managing public opinion of your brand and building brand affinity. Direct Messages (DMs) are important for responding to direct, private inquiries. With a digital omnichannel approach, agents can handle social media queries directly from the agent console, just as they would any other channel. According to a survey by Twitter, [85 percent of SMB Twitter users say it's important for businesses to provide customer service using the network](#). Of the customers surveyed, 83 percent said that getting a reply on Twitter improved their opinion of the business.

Ticketing and email

Email is the original digital channel and the first real alternative to voice, pre-dating web-based contact forms by several years (think AOL and CompuServe). Chances are you've been using email for customer support for quite some time now. That said, email clients like Outlook and Gmail weren't designed for customer service, so they come up short in this department.

That's where Ticketing comes in. If you're not familiar with ticketing, think of it as 'email meets to-do list'. A ticket is a digital case – a discrete issue that isn't solved in real time and needs follow-up action. Ticketing lets businesses manage more complex customer queries that require either more time to resolve, collaboration from multiple agents, or both. Tickets are a tried-and-true component of any serious support team and don't necessarily adhere to any specific channel. In the digital era, many companies automatically create tickets from email submissions while also allowing messages from other channels — chat, social, SMS — to be converted into tickets as well. Complete messaging history can be attached to tickets so that agents have access to the customers' full story, even if the issue switches hands (or channels). Ticketing allows for more agile and effective customer service than a simple email inbox system. With easier routing and collaboration, it yields quicker resolutions and happier customers.

SMS Texting

SMS texting is the single most used smartphone feature worldwide. It is the dominant way of communicating between individuals, and soon will be between individuals and the brands they support. According to research, [48.7 million people will choose to receive business SMS messages in 2020](#). Texting is so ubiquitous and trusted that it is the ideal channel for sharing important information with your customers that requires relatively quick action. ([SMS messages have a 209 percent higher response rate](#) than phone, email, or Facebook). From appointment or shipping confirmations to security alerts and product recalls, texting – both inbound and outbound – should be a standard channel for every organization.

Social Messaging

Social messaging (or Instant Messaging) is like texting, but via an internet-based application. You might be familiar with Facebook Messenger, WhatsApp, Twitter DM, WeChat, and others. Social messaging apps can be accessed via a mobile device or a desktop, and include robust features like file sharing, video, and more. Facebook Messenger is the most popular messaging app in the United States with [106.4 million unique users](#) of this platform. With frequent Business API updates and a rich set of features, it is also the easiest to integrate with your customer service software. Worldwide, [WeChat is the most popular messaging platform](#), with more than 1.6 billion users, compared to 1.3 billion for Facebook Messenger.

Knowledge Base

Knowledge bases – self-serve online directories containing hundreds or even thousands of articles – are available to customers at any time of the day and are critical for customers who prefer to take matters into their own hands. [More than six in ten U.S. consumers say that their go-to channel for simple inquiries is a digital self-service tool](#), according to a study by American Express. Since information distributed through this channel is consumed when and where customers want at their own pace, this tool can help buyers understand the product or service better before purchasing and helps increase loyalty post-purchase. A knowledge base means that your customers will never have to wait in a queue to get the answers they need.

Pro Tip

Make sure your customers can access your knowledge base directly via a web page and right from your live chat window. The more accessible it is, the more it will serve customers who prefer to self-serve and the more it will deflect queries away from your live agents. Searchability is key!

Chatbots

According to the Aspect Consumer Experience Index, [61 percent of consumers feel that having chatbots in customer service is the way of the future](#). Chatbots can be deployed on live chat and on social and SMS channels as well. Chatbots have a high success rate of solving customer inquiries—Comm100's 2020 Live Chat Benchmark Report found that bots completed 68.9 percent of their chats without human involvement, up from just 25 percent in 2018. Chatbots are not only cost-effective alternatives to a 24/7 human customer service team; agent-facing AI can also assist customer service representatives by listening in on conversations and suggesting knowledge base articles, building standardized response models, and facilitating agent training.

Together, these digital channels span both real-time (instant) and anytime (within hours or days) customer communication. Self-service channels like knowledge bases and chatbots take pressure off agents by reducing the volume of support requests made in real-time

channels and after hours. Real-time channels will thus have lower queues and wait times, and agents will be more readily available for complicated queries which can be more fulfilling to handle.

Pro Tip

When adding new channels, make sure you have the staff to manage them. For example, chat and text are immediate-demand channels, so you must have resources to meet those needs. It's better to start with fewer channels and to make sure that these processes are fully staffed and completely connected than to establish several channels. Once you have established an omnichannel system, it will be easy to add new channels to the mix.

Evaluate your digital customer journey

To know if your digital investments will improve the customer experience, you must understand how different devices, touchpoints, and interactions play into the customer journey.

Each channel you add means a new source of customer data, which when collected in a single [digital omnichannel system](#) can help you with customer journey mapping. Remember that channels shouldn't be added just for the sake of it—digital touchpoints should reflect a larger strategy to move your customers effortlessly through their journey while meeting your company's customer service and sales goals.

Eighty percent of senior-ranking marketers agree that [a cohesive customer journey is critical for success](#), according to Salesforce. To evaluate the effectiveness of your customer journey, start by evaluating the health of your digital sales funnel. This funnel reflects which digital touchpoints your customers use in the early stages of their journey, and how each channel moves them to their next interaction and ultimately towards purchase. (We talked about this above when evaluating how digital omnichannel could affect your MQLs and other funnel metrics.)

Consider:

How easily are prospective customers moving through your content? Are they meeting the milestones necessary to convert from leads into buyers? What could be improved to help them reach these milestones? Can they access clear resources or self-service options if they have purchasing doubts? Can customers easily contact your organization if they still need help? Is there a chatbot available to answer common queries across channels in case an agent isn't available?

Platforms like Google Analytics can show you where buyers are dropping out of the customer journey on a regular basis. Based on these insights, you can strengthen your digital touchpoints to improve your click-through rate, increase sign-ups, remedy shopping cart abandonment, gain more feedback, and achieve your sales and customer service goals. For example, you might find that customers get through to the page where they need to provide their shipping address and then they leave. Try a proactive chat here to offer assistance if they need it. It could be that they are just confused about the difference between billing and shipping addresses.

Pro Tip

Your most effective digital touchpoints will vary based on who you are serving, and what stage of the buying process they are at. For example, B2B customers conduct research on social channels like LinkedIn and Twitter, but typically don't reach out to companies on these channels. For customer support, they prefer traditional channels such as live chat or email, where they expect a response in 1 to 24 hours. A digital omnichannel platform will help you prioritize and respond to these messages quickly and effectively. B2C customers, on the other hand, prefer live chat, texting, and social media communication for customer support. They often want and expect a faster response and will use the channels that are known for speed and convenience to get it.

Evaluate your current tech stack

Examining your tech stack will help you determine what you need to succeed with digital omnichannel.

Consider which technologies you currently have in place to achieve your customer service and sales goals and how well they are performing. If you are starting from scratch, consider the building blocks that you need. A CRM and an omnichannel customer engagement platform are enough for most businesses to get started. If you are looking to improve your existing tech stack, remember that consolidation is key. If you use five different types of software to connect agents with customers, you are at risk of not only having siloed experiences but also a reporting nightmare.

Here are some solutions to consider and how they fit in with digital omnichannel:

Customer Relationship Management (CRM): Your CRM is the lifeblood of customer engagement, whether it be customer service or sales. This technology houses all the data points you have gathered about your customers in one place, whether it's a list of which products they've bought or their date of birth. Integrating a CRM into your digital omnichannel engagement platform can ensure your customers' engagements across channels are all documented in one place. It can also allow you to route the customer to the correct department or agent while providing your agents with a full view of the customer from within the agent console, providing important context to help resolve issues and create upsell opportunities.

Marketing Automation Systems (MAS): This is how you're tracking and automating all prospect and customer marketing touchpoints. This is usually integrated with your CRM to provide a full customer view and history. When a digital omnichannel engagement platform is added, it sheds more light on the entire buyer journey and enables richer multi-touch attribution.

Telephony Systems: Most contact centers use some form of telephony system to manage, record, quality assure, and rate their phone interactions with customers. Ideally, key information from these systems such as a call transcript or the agent's call notes will be added to your CRM via integration, and then accessed in your digital customer engagement platform's agent console. Because phone relies on voice, it is differentiated from text-led digital channels and carries its own SLAs.

Knowledge Base (KB): While some companies simply have an FAQ page on their website, others use a more robust knowledge base to offer richer information resources. A good digital omnichannel platform will include a built-in KB that serves your customers and your agents – the latter using the KB’s formatted responses to handle a wide range of questions. The net effect: improved agent efficiency, reduced average chat lengths, shorter wait times, and happier customers. Your KB can also serve as the knowledge foundation for your training your chatbot.

Ticketing: Some customer service and support teams use a solution that automatically converts inbound emails to tickets, a more organized and transparent method of receiving and resolving more complex customer queries. A good digital omnichannel solution will enable you to create tickets regardless of channel – live chat, social messaging, email, or SMS – and to bundle messages from the same customer on the same topic across multiple channels as one “conversation”. Warning: this capability paired with smart routing rules might make your legacy ticketing system redundant.

Social Messaging: Depending on your business, social media posts and messages might be handled by the Marketing or the Customer Service departments. A digital omnichannel platform isn’t going to schedule images, captions, and links to automatically post to your social media accounts at a specified time, but it can take inbound messages and route them to the correct department – whether it’s a support inquiry or a PR issue. It can also schedule outbound messages from your team to individuals who’ve already reached out to you – perhaps with a reminder or an update on their inquiry.

Pro Tip

When evaluating your current tech stack, remember to consider how well your software plays together. If your CRM and customer engagement platform don’t have a symbiotic relationship, you won’t be able to deliver on your customer’s omnichannel expectations.

Choose a digital omnichannel vendor

When choosing an omnichannel vendor, create a list of evaluation criteria so you can compare platforms and pick the best one for your business. We'll get you started. The ideal digital omnichannel customer engagement platform will:

- **Provide an omnichannel view of the customer.** At its core, your digital customer engagement solution should provide you with a single view of customer engagement or interaction history and customer data across all relevant channels.
- **Accommodate your most valuable digital channels.** If your go-to service channel is live chat or your main sales tool is LinkedIn messaging, the customer engagement platform you choose should incorporate those channels.
- **Include audio and video chat.** We've all been there when you're messaging back and forth with someone and you think - "Wouldn't this be so much easier on a call?" Good customer engagement platforms will allow your agents to switch from live chat to a video or voice call (and your customers should be able to request this) even if it is only made available to select customers like VIPs ([More on p. 29](#)). It will greatly improve your FCR rates and handle times.
- **Offer co-browsing.** Another way to help FCR and handle times is to allow your agents, with the customer's permission, to see what the customer is seeing on their screen and interact with their web browser so they can walk them step-by-step through an issue resolution. This intimate, one-on-one approach also makes the customer feel like a VIP.
- **Create and bundle tickets across channels.** If a customer reaches out on Facebook Messenger, you will need to assign this to an agent just as you would if they had reached out by email. If the customer reaches out on both channels about the same issue, you should be able to bundle them together as one ticket to improve efficiency and provide the customer with a cohesive experience.
- **Include a Knowledge Base.** An external-facing knowledge base will help your customers find answers to their frequently asked questions, while an internal-facing KB can help train your agents, provide canned messages for your agents to pull from, and fuel your chatbot responses.

- **Deploy chatbots on all digital channels.** Chatbots have proven their value by handling 68% of chats on live chat and earning a higher CSAT than agent-only chat interactions. Why not apply this proven technology across other channels like SMS texting and social messaging?
- **Enable custom routing.** Depending on what's best for your organization, custom routing can be programmed based on region, customer status, agent experience and/or skillset, or more, to help your agents be more effective. ([More on p. 26](#))
- **Leverage agent-facing AI.** Artificial intelligence isn't just for chatbots. Advanced customer engagement platforms use Natural Language Processing (NLP) to read what the customer is typing in real-time and recommend a response to your agents, whether it be from canned messages, internal or external KBs, or programmed chatbot responses. This AI application greatly reduces or even eliminates the time it takes your agents to search for answers and then type them out. It also increases concurrency and frees up their time to spend on conversations that require more personal attention.
- **Include robust reporting.** Without comprehensive reporting capabilities, it is very difficult to prove that your customer engagement platform is helping you achieve the metrics on page X. This will help you tie omnichannel strategy, efforts, and results back to corporate goals.
- **Integrate with your CRM and other core systems.** While it would be ideal for every part of your tech stack to "talk to each other" directly, not every system can easily integrate with others. Most tools can, however, integrate with popular CRM platforms such as Salesforce or Microsoft Dynamics, turning your CRM into a true knowledge hub. When done right, CRM integration should be all your customer engagement platform needs.
- **Easy to use:** To reduce training time and time to ROI, the platform's interface should be easy and intuitive for both your customers and your agents to use.
- **Fast to deploy:** If deployment is too long and drawn out, it's a waste of your and your team's time and resources.

- **Ready out-of-the-box:** Customizations can make the difference between a good and great customer engagement solution for your business, but too many customizations can result in delays and a clunky interface. Ideally, the core features you need will already be available.
- **Supported by training and documentation:** When the vendor can provide training sessions and documentation, your agents will be onboarded faster, there will be less disruption to various business functions, and it will set you up for omnichannel success.
- **Proven successful:** Check case studies, references, and reliable vendor evaluation sites for ratings and reviews to see how the platform has worked for others, ideally in a business similar to yours.

Pro Tip

Phone use for customer service has steadily decreased over the past six years, and Forrester predicts that it will dip even further as customers increasingly adopt digital channels like web chat. By ensuring that your digital omnichannel solution prioritizes and incentivizes adoption of your digital channels, you will not only be on the way to reducing your costs but also setting yourself up for a more successful digital omnichannel deployment.

Prepare your organization for a digital omnichannel solution

Communicate your goals to the rest of the business

The leadership team across departments should have been involved in your goal setting and vendor selection process from the beginning to ensure business alignment and gain insights on anticipated impact for other teams, so this shouldn't be news to them. Once you have short-listed your top vendors, you will need to get cross-functional buy-in on those vendors from teams and departments including Customer Service, Sales, IT, Operations, and Marketing. Remind them of the importance of digital omnichannel technology that you discussed when you decided as a team to move forward with this project and how it aligns with the goals you all set. Loop them into the final selection process by acknowledging what each leader was looking for in the solution and which expectations each of your finalists are able to meet.

Ask your Customer Service, Support, Marketing and Sales department about current training initiatives and talk through how to most effectively prepare teams for the new software. Communicate how progress and documentation will be shared and create an active feedback loop to ensure a smooth transition to digital omnichannel.

With your company goals in mind, measure your baseline metrics so you know what you're starting with and so you can see real improvement or changes. Make a prediction about how you think the metrics will change after implementing omnichannel. Communicate this back to your leadership team to keep them informed and your team accountable.

Pro Tip

It's important to tell other departments what you're doing from the start so that if a team member needs help from another department with this project, the people in the other department are already enrolled and are invested in helping you reach your goals. Since the project's goals roll up to corporate goals, they should help that individual's goals too. This also puts accountability on everyone in the organization to drive results.

Structure your existing team for omnichannel

How your contact center currently distributes workload and functions as a team can affect how you approach staffing and training for digital omnichannel. Before teams adopt an omnichannel approach, they're typically in one of the following structures:

- **Single-channel teams.** Rather than having every team member respond on every type of channel, your agents might be used to specializing in one single channel. Certain agents may be trained to format their responses for emails and don't receive incoming live chats during their day at all, while other agents may be exclusively routed live chat messages. This method is often used by larger teams who want highly specialized agents, and who want to avoid training every agent on the different communication standards of each platform.
- **Rotating teams.** Some contact center managers assign their agents just one channel at a time, but, unlike single-channel-specialized teams, the agent rotates through different channels according to a schedule. One day an agent may be exclusively tackling social media queries, and the next day they may be on live chat. Rotating teams are often used by medium-sized customer service operations that may want to redistribute agents depending on need (i.e. which queue is the highest). This method also gives agents a broader wealth of experience, keeps them engaged, and makes it easier for the team to tackle queue overflow.
- **True omnichannel teams.** Even without digital omnichannel systems, your team may have had omnichannel training. On an omnichannel team, every agent can handle any type of inbound query that comes their way, regardless of channel. These agents can connect with the customer wherever they are in their journey. This tends to be true for smaller teams with only a few, multi-trained and talented agents.

Your culture and strategy will determine what the best structure is for your organization. The bigger you are, the more sense it may make to use single-channel teams: one for chat, another for email, another for social, etc. The big benefit here is you won't need to cross-train every agent on every channel, instructing them on any unique, channel-specific policies you may have (e.g. language, response formatting, tone, etc.) While this may seem counter-intuitive for an omnichannel strategy, you can configure your digital omnichannel solution with custom routing rules that deliver the right query to the right agent. If structuring

your teams by channel works well for your company, omnichannel lets you execute while ensuring that case knowledge and customer history are shared across teams, which is where the true value in omnichannel lies.

The next option is to train your entire team to handle the demands of multiple channels, creating a truly omnichannel team. If all or most of your agents are equipped to handle responses regardless of channel or product, then your team can easily take on an omnichannel approach to training. This can result in a more personalized experience for customers, as they don't necessarily have to be passed off from one agent to the next as they move through the customer journey. However, in order to maintain quality response standards, you must train agents on how to set the appropriate tone for each and every channel that they use. (Note that Intelligent Assistance like [Comm100's Agent Assist](#) can help with this). This approach may be better suited to smaller customer service teams.

Pro Tip

Not every team member will be able to handle issues of every difficulty, and that's okay. Train your team in proper escalation techniques to deliver a successful omnichannel experience. In Comm100's console, agents can share queries with one another, making internal transfers to your senior support staff quick and simple.

How to implement a successful digital omnichannel program

Communicate rules of engagement and SLAs with your staff

Eighty-five percent of companies who identified as top-performers in omnichannel strategy report regularly training customer support agents in omnichannel communications, a study by Aberdeen Group revealed. This includes training agents in rules of engagement and Service Level Agreements (SLAs).

Your staff should know how they are expected to perform and communicate as a whole, as well as on specific channels. Establish clear and consistent standards or internal guidelines for tone, vocabulary, and style to ensure agent success and explain why those standards are the way they are. For the rules of omnichannel engagement, see [page 30](#).

SLAs are promises that you make to your customers. They keep your organization and staff accountable. SLAs often differ by channel, type, or severity of an issue, and/or customer segment. They should be time-contingent and consider how quickly agents can realistically deliver without sacrificing service quality.

Response SLAs ensure that customers aren't left waiting for a reply, and that agents promptly acknowledge their inquiry. (Think: how quickly should agents send the first live chat message? For example, you might promise your customers to respond to emails within 24 hours, but to SMS and social messages within 1 hour.) The right response SLA will show current and prospective customers that you value their time and are attentive to their needs and expectations.

Comm100 SLA configuration ensures that when a message comes in from a customer, it gets immediately prioritized or deprioritized in the agent's queue by pushing it up or down their list of messages and tagging it accordingly. Messages that are at risk of missing your SLAs will turn red, while those in good shape will be green, both including the time to or since expiry. If your omnichannel solution doesn't do this, then your agents will need more explicit training and reiterating on how to prioritize messages.

Pro Tip

Live chat users expect to be connected to an agent in a minute or less during online business hours. On Facebook, 85 percent of customers want a response from companies within six hours, while 64 percent of customers on Twitter expect a response within an hour. By understanding what customers expect for each channel, you can prioritize your responses according to what response times they deem reasonable.

Use routing rules to take advantage of agent skillsets

Routing allows you to connect customers with the right person, at the right time, instantly and automatically. In digital omnichannel systems, routing rules can be established and applied across all channels. Customers will automatically be sent to the person or team that can best serve them, lowering agent handover and yielding more efficient service.

You get to determine your routing rules based on what matters most to you. Depending on your team's current workflow, you can use routing rules to distribute inbound queries based on the following:

Channel: Routing by channel sends customers to agents who are most adept to deal with that specific channel. This works well for teams that have structured their workflow and training around specializing in channels.

Example: *Danny reaches out to a company publicly through a Facebook post. His query is automatically transferred to Jennifer, who specializes in responding to public Facebook messages and trained on when to consult the marketing team for PR advice.*

Customer journey: Does your customer need to connect with the support department or the sales team? Are they looking for information about a product or for help with an order? By automatically routing customers to the right department or agent based where they are in their journey or what department they need to contact, you can convert more leads into customers and offer better support.

Example: *Anna contacts a company via live chat hoping to speak with a support agent. The pre-chat form asks her to specify the nature of her request. Anna selects "Billing" and is automatically routed to Lucas, a customer support agent who is trained addressing billing inquiries.*

Past contact history: Companies can establish routing rules based on a customer's status or profile with the company, enabling them to easily connect VIP customers to their dedicated account manager, angry customers to an agent who is familiar with their issue, and more. This can be done easily by designating customers as VIPs within your CRM system ([more on p. 29](#)).

Example: *David is corresponding with Tom for help with an ongoing, high-priority issue. Because David has been assigned to Tom in the system, he will automatically be routed to him whenever he comes online during business hours.*

Region: If your company has branches for different regions, you can route customers to the correct branch based on their location data. This is a good approach if your organization has region-specific products, offers, or promotions, and can easily be implemented using the Multiple Campaigns feature in Comm100.

Example: *Zach reaches out to a large automotive dealership with a sales question on Facebook Messenger. He is asked to input his zip code to be connected to an agent (on the company's webpage, location information could be automatically retrieved based on his IP address). Because Zach is located in the Northeastern United States, he is automatically connected with the appropriate agent who is in his time zone, and who knows about the vehicles and prices available in his region.*

Language: Enterprise-level digital omnichannel solutions like Comm100 have automatic translation for over 100 languages, enabling agents to have a two-way conversation no matter where they are in the world and what language they speak. Still, if your organization has a large international audience, you will want to route customers according to their language to ensure that they are served by appropriate agents. This can be done automatically based on reported browser language or the language that the customer selects on your webpage.

Example: *Camila reaches out to a travel agency via SMS. Her mobile carrier identifies her as coming from a Spanish speaking country. Thanks to automatic routing rules, she is sent to an agent who is fluent in Spanish and is ready and happy to serve her.*

Pro Tip

Thoughtful planning and a deep awareness of the customer journey are key when it comes to routing. You can have multiple routing rules and prioritize them according to what takes precedence. For example, if you have a non-English speaking customer, it may be more important to route them to someone who speaks their language rather than someone who specializes in the channel they are connecting from.

Designate red carpet treatment for your VIPs

One of the perks of digital omnichannel is your ability to identify and serve your VIPs wherever and whenever they come calling (i.e. on any channel).

Your VIPs are your company's most important customers, as defined by you. You might give VIP status to business partners, A-list prospects that match your ICP (Ideal Customer Profile), big spenders, influencers, and certain upset customers (such as ones who have previously flamed your brand on a public platform). Click the link for a list of the profiles that [every company should consider making VIP](#).

Once you have identified your most valuable VIPs and tagged them in your CRM, use your digital omnichannel platform to design a consistent red-carpet treatment for them. Here are some of the ways that you can give your VIPs the customer experience they require:

Designate an account manager

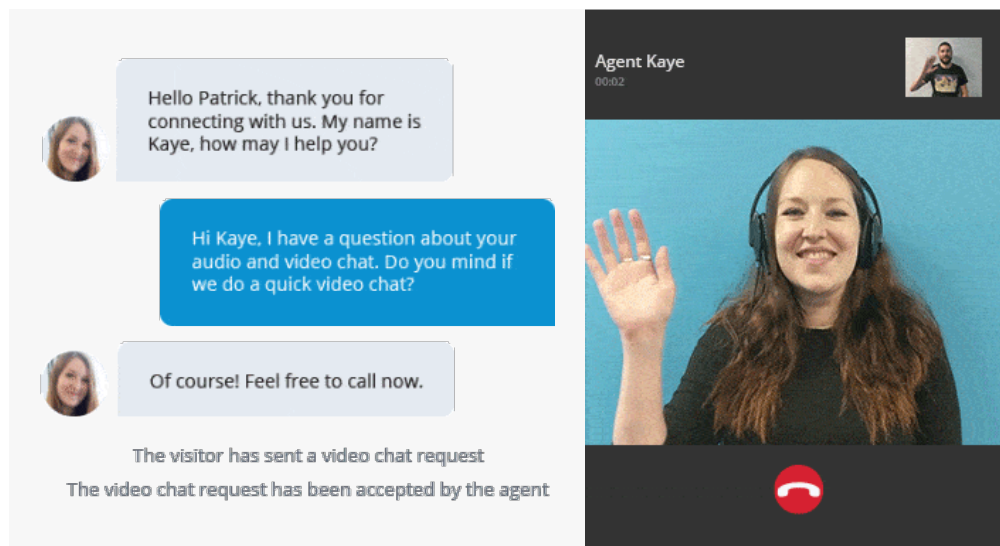
[79 percent of business buyers](#) say it's critical to interact with a salesperson who is a trusted advisor and adds value to their business — not just any old sales rep. By giving top-tier VIPs a direct line of communication to their respective salespeople and account managers, you can boost conversions while also increasing the quality of your online relationship.

Offer proactive white-glove assistance

Don't miss out on an opportunity to help a VIP that is visiting your website. Extend exclusive care by offering your support before they even ask. With proactive chat, companies can automate messages that align with each customer's situation and engage them when they need it most. By coupling proactive assistance and personalization, you will create a truly VIP experience. (For example, if a high-profile banking client comes on, a message can automatically be sent to them saying "Hi [Salutation] [Last Name], how can I help you today?")

Provide audio and video chat

Like any great relationship, face time is key to developing trust and rapport with your customers and prospects. Switching the live chat to an audio or video call (all within the same browser) can help you build a closer relationship with your VIPs and troubleshoot queries faster. It's also cheaper for your organization than a phone call and better for your VIPs too, especially if they are contacting you internationally!



Audio and video chat is made easy using Comm100 to provide a personalized experience and often faster resolution.

Pro Tip

Identify your VIPs with a tag in your CRM. That way, your agents immediately recognize the type and priority level of each VIP when they reach out. For example, a VIP could be named "VIP-Spend 5" if they are a high-priority big spender, and "VIP-Upset-2" if they are a medium priority upset customer. Assigning them this status can also initiate unique SLAs (service level agreements) in your customer engagement platform, such as how quickly the agent needs to respond to the VIP. For more information on supporting your VIPs customer, read our white paper - [Never Miss a VIP: How to Identify and Delight Your Most Important Customers in the Digital World](#).

Best practices for omnichannel agent engagement

Part of any successful digital program is learning and communicating best practices. Here are three digital omnichannel best practices that your agents should follow when engaging with customers whether they are a VIP or a first-time inquirer:

Use the entire customer journey to inform interactions

One of the key features of digital omnichannel is that agents can see the entire digital customer journey in front of them. One of the ways agents can make use of this information is personalization. Agents should address customers by name and reference past correspondence as needed. For example, “Hi Sarah! I see you spoke with Jason about this issue on Monday.” This shows consistency and lets the customer know right away that they won’t have to repeat themselves and that you understand, which helps build confidence and loyalty. Agents can also use the customer journey, CRM, and web activity including shopping cart data to inform upselling and cross-selling initiatives in real-time.

Let the customer guide the experience (stay on their preferred channel)

Unless instructed otherwise, agents should always respond to customers on the same channel as the original inbound request. After all, the whole point of digital omnichannel is to make customer interactions a seamless, not aggregate effort. Some situations where it may be appropriate to switch channels are:

Switching from a public platform to private secure messaging. This channel switch might be appropriate if a customer has reached out publicly on social media about a matter that’s private or that will involve you asking for personal data as a form of identity verification. In this case, your agent may need to switch to a one-on-one private platform, whether that be via direct messaging on the same social platform or switching to SMS, live chat, or email. If this type of switch has to happen, the agent should inform the customer publicly that the switch will take place, then initiate the private chat so the customer doesn’t have to reach out a second time.

Switching from live chat to video chat. Some customers will be happy to oblige in video chat, where others may prefer faceless contact. Ask your customer what they would prefer so they are not caught off guard by an incoming video call. Invite your

customer to engage in a video or audio chat as an added value offer, not to uproot or inconvenience them.

Switching from a chatbot to an agent. If a customer asks to switch from a chatbot to an agent, always grant this request whenever there is an agent available. This doesn't have to involve channel switching, and your agents will already have any data collected by the chatbot about the query at the ready so the conversation can continue without disruption. If there are no agents available, program the chatbot to let the customer know that they have notified an agent and they will respond as soon as they can. When that happens, ask if the channel they first reached out on still works for them. For example, if a customer is live chatting with a chatbot, they might prefer to hear back from the agent later over email or SMS text.

Follow up with key customers

Digital omnichannel empowers agents to follow up on particular customers' queries on an as-needed basis. Schedule an automated follow-up or reengage with specific customers and VIPs as needed when they come online. For example, if a customer reaches out to your company complaining that their order was damaged in shipping not once but twice, the agent can submit a replacement order and schedule a follow-up in a week to make sure that the customer received their order intact this time. This is where proactive engagement can feel useful, not intrusive!

Pro Tip

If your chatbot is set up to be your first form of contact with your customers through live chat, SMS, or social messaging, be mindful of how your customers decide to interact with it. If you have a customer who has asked to switch to a live chat agent instead of interacting with your chatbot the last 3 times, connect them to a live agent immediately next time they are online.

The secret weapons of your digital omnichannel solution

A big part of digital omnichannel is delivering the right technology to empower your agents and customers no matter where they are. Here are some of the secret weapons of digital omnichannel that you can use to take your customer service to the next level:

A knowledge base across channels empowers customers

[Ninety-one percent of customers](#) say that they would use a knowledge base if it met their needs. With digital omnichannel, your KB is no longer confined to your website. Instead, customers can self-serve with a chatbot, or access your KB across channels, whether on WhatsApp, live chat, SMS, or social media. Empowering customers to take matters into their own hands wherever they are will not only satisfy them, but it will also boost agent morale as they will have fewer simple, repetitive (and often boring) FAQs to attend to. Happy customer, happy agent, successful company!

Chatbots deliver consistent, 24/7 service across channels

Chatbots use advanced NLP (natural language processing) engines to understand conversational dialog, quickly identify intent, and take relevant action to resolve customer queries. With a digital omnichannel solution, chatbots are available at any point of digital customer contact, so they can respond to social messages just as well as live chats. Chatbots are another resource that frees up agents from menial tasks and lets them focus on the kinds of issues that really make a difference – the kind of work that reminds them why they got into this business in the first place: to help people! If you have already established your customer's top FAQs or have a KB, you can use these answers as the building blocks to jumpstart your chatbot experience.

Agent Assistance increases agent capacity across channels

Convenience often sets brands apart. Other times it's the ability to have a delightful, human conversation. As helpful as they may be, people don't always want to use a knowledge base or speak to a chatbot — some people just want to speak to a human that they can trust with their issue.

While engaging with a customer over any digital channel using Comm100, agents can be supported by an AI application called Agent Assist. Agent Assist first reads what the customer is typing before they've hit send and interprets what their query is about. Then it supplies your agent with recommended responses in real-time, pulled from canned messages, KB articles, or chatbot responses. Your agents can use this as a starting point to craft an answer before the customer even finishes typing.

This increases efficiency by combining the speed of AI with the resourcefulness of your company's internal knowledge base and the wealth of your agents' human, personalized experience. With the best response (and the customer's history) at their fingertips, your agents can easily add customization and bring a valuable experience that makes your customer service so special.

Pro Tip

Comm100's 2020 Live Chat Benchmark Report found that bots completed 68.9 percent of their chats without human involvement — a massive 165 percent increase from 2018. Useful chatbot metrics for your team to report on to improve your chatbot overtime include the percentage and number of chats taken by a chatbot, how many of these it can resolve end-to-end without agent involvement, which answers it gives most frequently, and how helpful your visitors find its answer (CSAT scores for bot interactions). For companies that are new to AI, programs such as [Comm100's AIM](#) (Artificial Intelligence Mastery) are available to help you see results from your chatbot as quickly as possible.

Measure success and prove ROI with digital omnichannel reporting

After you have implemented digital omnichannel, look back at your goals and benchmarks from [page 8](#).

Sales and marketing goals, along with associated pipeline and revenue, are most likely to be found and reported through your CRM. A proper integration between your CRM and customer engagement platform, paired with the use of channel-specific UTMs in referral links, reveals the full picture of how your omnichannel solution impacted your sales and marketing goals including:

- **Revenue, AUM, Pipeline, MQLs, Leads:** How much of these metrics were generated by the customer service team? Which engagement channels seem to be the best lead or revenue generators?
- **Share of Wallet:** Have you been able to identify upsell and cross-sell opportunities with existing customers using the digital omnichannel solution?
- **Customer Churn:** Has your customer churn rate reduced? Are customers who engage with you on one or more channel at a lower risk of churning?

Customer success metrics should be readily available to define, track, and measure right in your customer engagement platform. Your omnichannel solution should offer extensive reporting, making it easy to see how far you've come. These should include:

- **Conversational Conversions:** You should be able to define and track conversation conversions in your customer engagement platform. Ask yourself: Did your conversion rate on these channels from conversations to a sale, demo, or other key milestone increase?
- **Customer Satisfaction:** You should be able to set up post-chat surveys across all channels to measure CSAT. Ask yourself: Did your CSAT improve? How does CSAT compare between channels? How does bot CSAT compare to agent CSAT?

- **Customer Effort Score, Net Promoter Score:** This can be asked in a post-chat survey across all channels. Ask yourself: Did your CES or NPS improve? Do customers feel that you're providing them with a more convenient experience and would they recommend you to others?
- **First Contact Resolution:** Your agents, chatbots, or customers should be able to mark whether a query was resolved or not in your console. Ask yourself: Has your FCR rate improved? Or do customers still have to come back repeatedly for one answer?
- **Handle Time:** Your handle time doesn't immediately paint a picture of "good" or "bad" service without further QA. A long handle time could mean a frustrating experience, or a highly personalized, pleasant one for the customer. Handle times might also differ across channels, such as live chat vs. video chat. Ask yourself: Has your handle time gone down? And how does that relate to customer satisfaction?
- **Time in Motion:** Ask yourself: Has the amount of time your customers spend getting transferred increased or decreased? With intelligent routing, you can expect your time in motion to decrease.
- **Chatbot Success Rate.** Ask yourself: Have your chatbots been able to handle and resolve more queries on their own, now that they have been deployed across all channels and equipped with KB and other responses? For more chatbot metrics, refer back to [page 14](#) and [page 33](#).
- **Agent Churn Rate and Morale:** Every growing or mature customer service center should have the means to evaluate agent retention and satisfaction. Ask yourself: Did your agent churn rate decrease and agent morale scores increase? When talking to your agents, do they seem happier doing their jobs?

Comm100 offers reports that can be viewed by channel, agent, department, campaign, and visitor segment. Companies can view which departments or agents garner the highest CSAT ratings, best adhere to SLAs, and handle the largest workload. Users of Comm100 can also track conversions by defining website actions they consider valuable, whether that be a content download, sign up, or purchase, and track which agents are best at influencing these actions. Each action can be scored so that the conversion report will tell you which agents are generating the most or least value.

Digital omnichannel reporting helps you assess whether a campaign or visitor segment is working as expected. Comm100's conversion analytics helps you connect the dots between your conversations and conversions. See which interactions inspired customers to take a desired action, such as making a purchase, signing up for an account, downloading a content offer, watching a video, and more. Conversion details such as an action name, conversion time and achieved dollar value are captured in each chat transcript to help you keep track. Tie this back to proving your team's ROI.

Pro Tip

It's always important to iterate your goals for the next period based on what you achieved and learned. Put what you've learned from your reporting back into your processes and use it to improve and inform your future goals.

If you're interested in finding out more about Comm100, take a short product tour of our digital omnichannel platform and find out if it's the solution for you.

[Take a Tour](#)



A final word on omnichannel success

Advances in technology have created a plethora of digital channels that humans use to engage with each other every day. For organizations, these disparate channels can be hard to manage and reconcile when mapping their customers' journey and building an effective customer service strategy. A digital omnichannel solution breaks down the barriers between channels so you can deliver truly seamless, exceptional customer experiences.

Deploying a comprehensive, customer-oriented digital omnichannel solution is a big undertaking that requires thoughtful planning and execution. This ebook was written to provide a wealth of advice on how to optimize digital omnichannel engagement for your organization. From assessing your needs to choosing the right platform to establishing and measuring your KPIs, hopefully you've picked up some useful tips.

One final word of advice: start small. Begin your digital omnichannel initiative by onboarding a small portion of your agents first. Add just a couple of channels to start and a few basic routing rules. If you are adding AI for the first time and are nervous about launching a chatbot after you think (but don't know) that you've programmed it to respond to all intents, start by letting your chatbot interact with just 10 percent of your website visitors and see how it performs. Leave some room for trial and error as you figure out which practices work best within your own organization. Break up the tasks and best practices outlined in this ebook into smaller goals over time. A minimum viable product will already be an improvement and you can grow from there.

Once you have proven success, even on a small scale, reiterate and roll it out to the next part of the business until your entire Customer Service, Sales, and Marketing teams are on the same page. It may take some time, but once you get there, it will be worth it for the unified customer insights, experience, and accelerated growth.



Let's chat

Comm100 is a leading global provider of omnichannel customer experience solutions with a mission to make online service and support delivery more genuine, more personalized, and more productive through meaningful conversations. Let us show you how.

[Learn more](#)